

# SmartAdvocate Release Notes (v2016.08.18)

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These release notes cover updates and new features added to the SmartAdvocate software between February 2016 and August 2016.

## Important Notes

This release of SmartAdvocate, like so many of our past releases, introduces hundreds of changes that will make your practice more productive and efficient. Here are some of the highlights:

- Over 100 new merge codes have been added.
- Support for mass updates of case types in the administration section has been added.
- SmartAdvocate plugins for Outlook and Word can now use Web Services instead of direct SQL connection.
- Templates for Text Messages have been introduced.
- Email Templates now support standard Merge Codes instead of email-specific placeholders.
- Support for barcodes in document templates has been introduced. Now you can generate a barcode along with the document, so when the document comes back you can scan it immediately.
- Files can now be renamed using case/document information when downloaded or emailed.

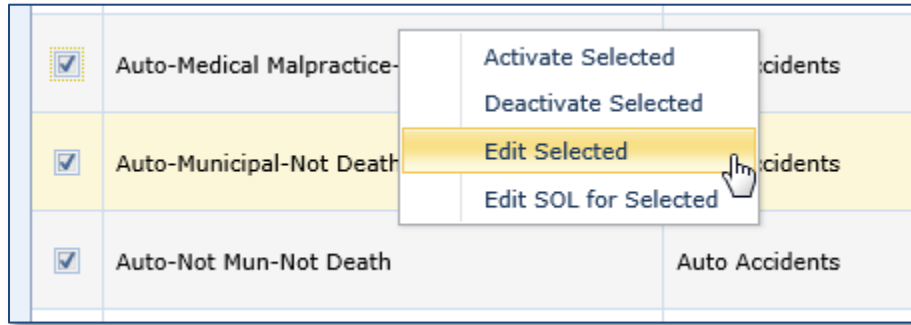
## Integrations New and Previously Available

- **CallFire** – Texting Service. Send and receive text messages directly in SmartAdvocate.  
<http://www.callfire.com>
- **Deitz Court Reporting** – Court reporting services. Receive deposition transcripts directly in SmartAdvocate.  
<http://deitzcourtreporting.com/>
- **eLaw** – eDocket, eCalendaring, Calendar e-watching and e-copying Service. Get court appointments directly to your SA (and Outlook) calendar.  
<http://www.e-law.com/>
- **inSync** – Litigation Support Service. Processes summons & complaints, affidavits of service, index numbers and more. Get documents and bills directly to you and automatically uploaded to SA. Get index number directly into SA.  
<http://www.insynclitigation.com/>
- **Legal Intake Professionals** – Legal Answering Service & More. Get new cases created from LIP leads automatically.  
<http://www.legalintake.com/>
- **National Record Retrieval** – Medical Records Retrieval Service. Request medical records directly from SA and get the received records automatically sent to SA.  
<https://www.nationalrr.com/>
- **Ngage** – Website Chat Service. Get new cases created from Ngage leads automatically.  
<http://www.ngagelive.com/>
- **Persist** – Automated Lead Communications Service. Follow-up on your leads using automatic calling, IVR, voicemails, email and text. Fully integrated with SmartAdvocate's contacts, cases and statuses.  
<http://forpersist.com/>
- **PM Investigations** – Handle trial prep, process service, investigations, surveillance and statements. Get documents and bills directly to you and automatically uploaded to SA.  
<http://onlinepmi.com/>
- **QuickBooks** – Accounting Software. Two-way synchronization for case disbursements (expenses).
- **Ring Central** – Phone System. Click-to-dial and screen-pop supported with Ring Central client software running on workstation.

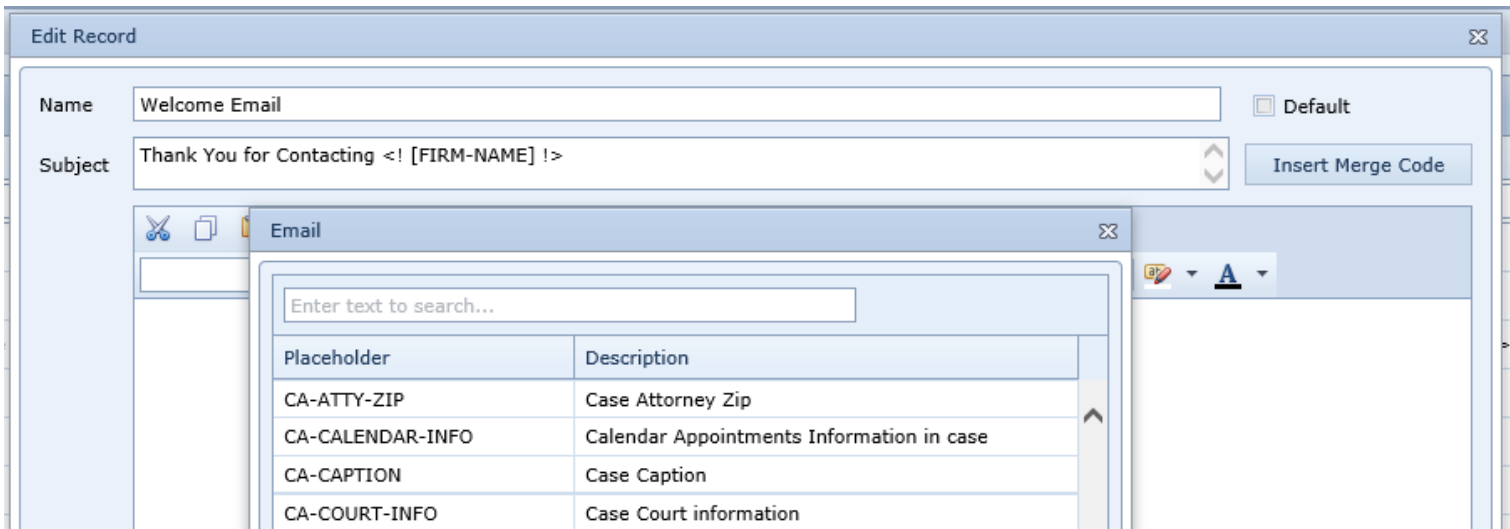
Note that most of the available integrations have a \$500 installation and configuration fee as well as 3<sup>rd</sup> party fees associated with them.

## Updated Pages

- Admin – Case Types – Support for mass updates of case types has been added.



- Admin – Email Templates – Email Templates now support standard Merge Codes instead of email-specific placeholders.



- Admin – UDF Editor – Ability to copy UDFs from one case type or incident type to another case type or incident type has been added.
- Admin – Users – Ability to mark users visible has been introduced. In the past the Active checkbox on the user's contact card was used to control visibility in lists that contain staff members.
- Case Browse – Text Search now supports more fields:

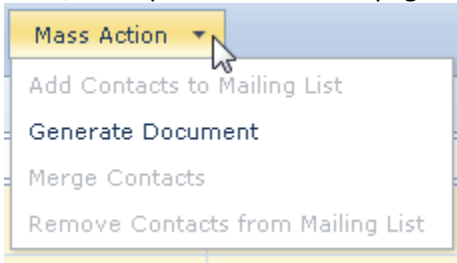


- Case Browse Results – Two new columns have been added: Total Liability Coverage and Retained Date.
- Contact – A new button to quickly add an employee to an organization has been added.

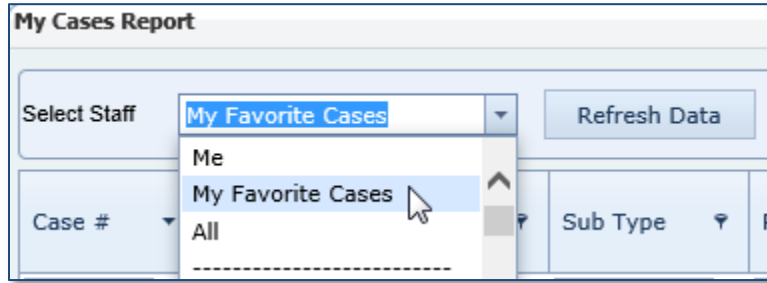


- Contact Search – The permission requirements for certain actions have been updated as follows: Only those with Full Access permission for the Contact Search page may merge contacts, and only those with Full Access or

Read/Write permission for the page may add contacts to mailing lists or export contact lists.



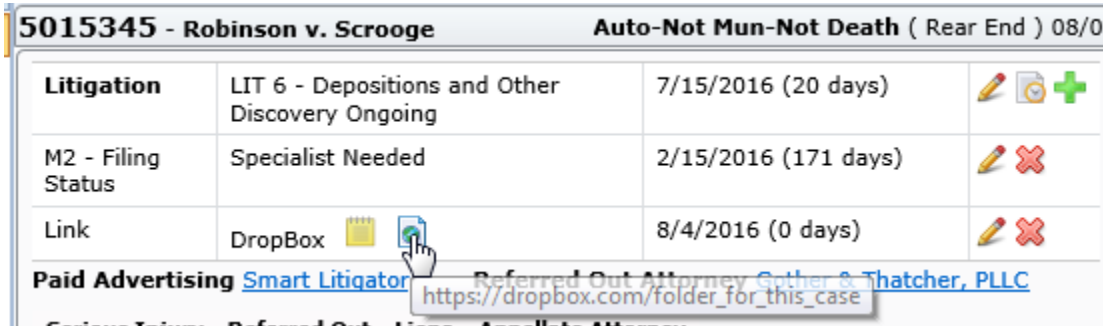
- Dashboards – My Cases – The option to display only favorite cases has been added:



- General – Case Summary – Text messages are now shown in the list of Last Notes.
- General – Case Summary – Staff comments and Refer Out comments are now shown on the Case Summary page.



- General – Case Summary –Links in status comments are now supported. When links are added to status comments, they will be converted into clickable icons on the Case Summary page. Each link has to be on its own line in the comment.



- General – Negotiation/Settlement – Totals have been added to the Settlements section.
- General – Negotiation/Settlement – Column filters have been added to the Negotiations and Settlements sections.
- Litigation – Appeals – This page has been redesigned and now matches the style, functionality and performance of the other SmartAdvocate pages.
- Litigation – Discovery – A new column has been added: Date To Comply.
- Litigation – Deposition – The ability link documents to deposition record was added (Court/Transcript tab).

Deposition Info	Served By	Deponent	Testify For	Documents
Entered: 08/18/2014 Type: Court Ordered Service Method: Court Order Date Served: 07/01/2014	Mother, jane	Ramadan, Scherezada S., Esq.		Letters - Defendant Attorney - Deposition Notice

- Litigation – Evidence – A new field has been added: Storage Contact.

- My SmartAdvocate – The Critical Deadlines panel can now be configured to include or not to include closed cases.

**Critical DeadLines**  
Critical Deadlines & SOLs due next 7 days Filter

Case	Case Name
1017260	Gomez v. Jones2

**Filter Configuration**

Include

Closed cases

- Other – Funding – This new page has been added to track funding of the case.

**Case Funding**

Add Case Funding

Funded By	Need to Pay Back	Comment
Plaintiff Funding Service	10%	test

- Other – Time Tracking – Activity duration can now be entered either in hours and minutes or in hours and fractions of an hour.

Tracking Date:\* 11/11/2013

Start Time: 09:30 AM      End Time: 05:00 PM

Duration: 7:30      Duration (hours): 7.50

Billing Rate: \$250.00      Auto Calculate

Billable Amount: \$1,875.00

- Other – Time Tracking – The default billing rate can be configured for each user under Admin -> Users.
- Plaintiff – Employment – Two new fields have been added: Temporary Total Disability and Average Weekly Wage.
- Plaintiff – Lien Tracking – A new column has been added: Docs, which shows the number of documents from the lienor and includes a link to the list of such documents.
- Plaintiff – Medical Providers – A new column has been added: Neg. Bills, which shows the total negotiated bill.
- Plaintiff – Medical Providers – Two other new columns have been added: Total Payments and Balance.
- Plaintiff – Medical Providers – The ability to export only medical providers (main grid only) or medical providers with visits, bills and payments has been implemented.

Export

Export to XLS(main grid only)

- Plaintiff – Medical Providers – A checkbox has been added to track medical providers to which client was referred by the Law Firm.

**Add/Edit Medical Provider**

Plaintiff:\*       Provider:\*

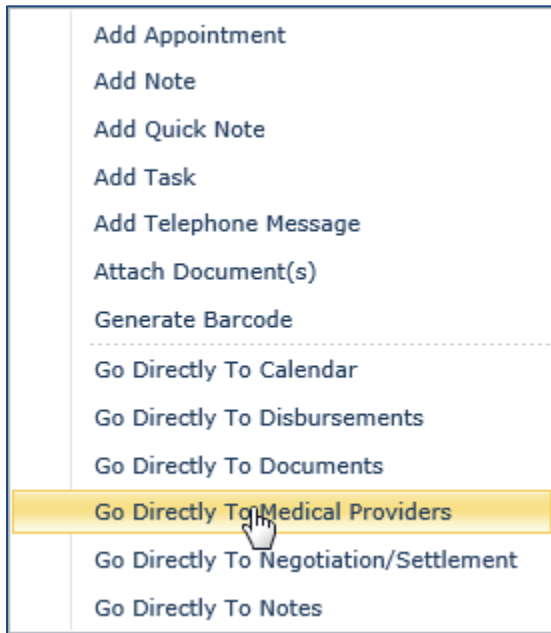
Start Date:       End Date:       Treatment ended:

Will Testify:       Hospital Chart/File #:       Expert:

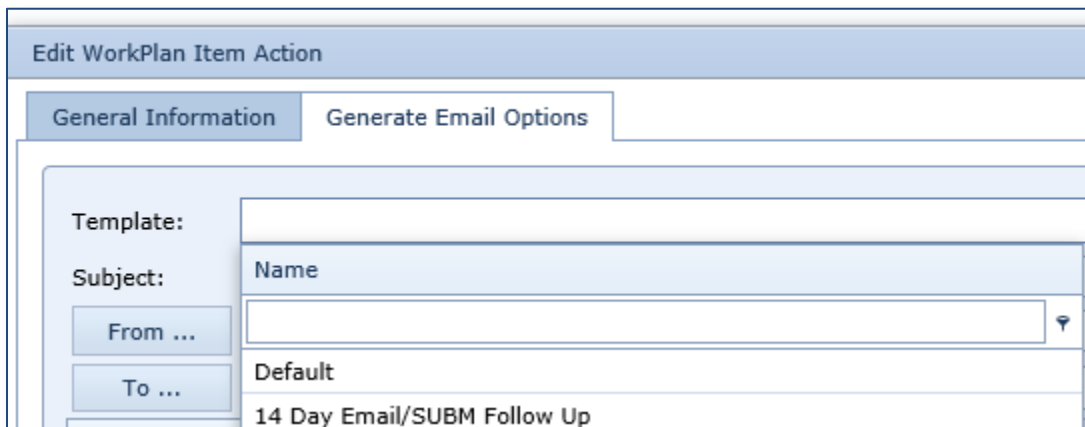
Total Visits:       **Is Referred:**

Comments:

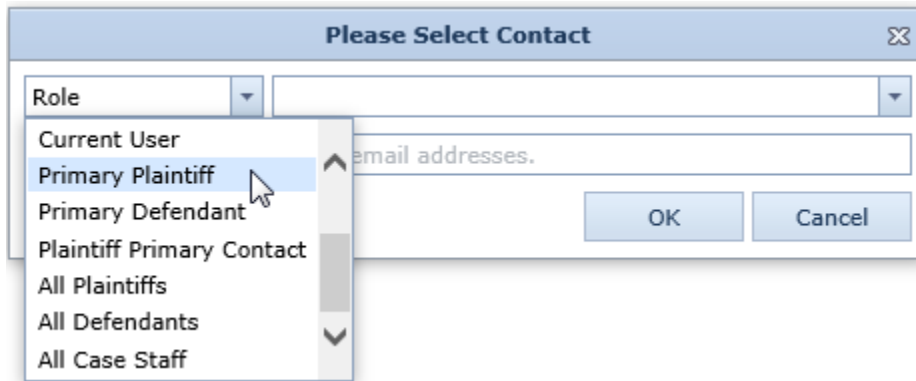
- Plaintiff – Other Providers – A new column has been added: Docs, which shows the number of documents from the provider and includes a link to the list of such documents.
- Plaintiff – Other Providers – A comments column has also been added.
- Plaintiff – Prior Injuries – A new column has been added to the Prior Injury Providers table: Docs, which shows the number of documents from the provider and includes a link to the list of such documents.
- Plaintiff – Special Damages – A new column has been added: Provider.
- Plaintiff – Summary – Two new grids have been added: Other Plaintiffs and Non-Plaintiff Party.
- Plaintiff/Defendant – Vehicles – A new field has been added: Plate Type.
- Tools – Document Scanning – This page has been redesigned and renamed “Mass Document Upload”. The page allows multiple documents to be uploaded and then quickly associated with one or more cases.
- Tools – Incomplete Cases – This page has been redesigned and now matches the style, functionality and performance of the other SmartAdvocate pages.
- Top Search Results – The ability to go directly to the Medical Providers screen has been added to the context menu:



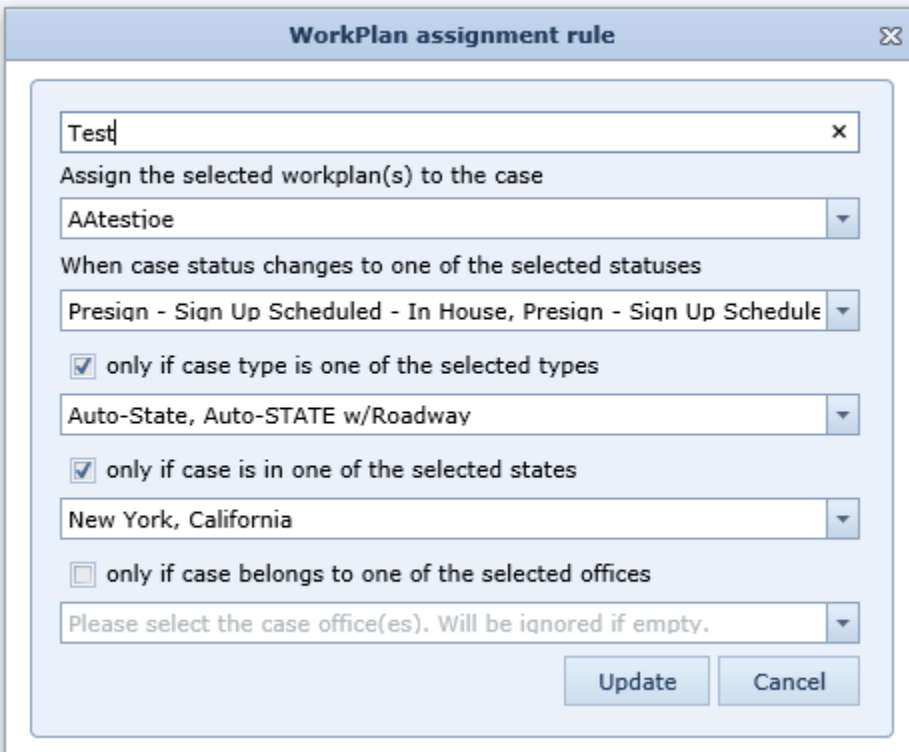
- Workplan Administration – Emails generated by the workplans can now be based on email templates.



- Workplan Administration – Ability to send workplan emails to plaintiff and defendants has been added.



- Workplan Assignments – Automatic workplan assignment rules have been enhanced to support more options. Now you can make automatic workplan assignments that are specific to the case's status, case type, state and office.



## New Merge Codes Added

ATTY-SIGN-ALL	Attorney firm service list with signature line for all
CA-ALL-NOTES	Case all notes
CA-ATTY-ADDR1	Case Attorney Address1
CA-ATTY-ADDR2	Case Attorney Address2
CA-ATTY-ADDR3	Case Attorney Address3
CA-ATTY-ADDRESS-BLOCK	Case Attorney Address Block
CA-ATTY-ADDR-HORIZ	Case Attorney Address Horizontal
CA-ATTY-CITY	Case Attorney City
CA-ATTY-CITY-STATE-ZIP	Case Attorney City, State Zip
CA-ATTY-CNTY	Case Attorney County
CA-ATTY-FIRM-ROLE	Case Attorney Firm Role
CA-ATTY-NAME	Case Attorney Full Name
CA-ATTY-STATE	Case Attorney State
CA-ATTY-TITLE	Case Attorney Title
CA-ATTY-ZIP	Case Attorney Zip
CA-CALENDAR-INFO	Calendar Appointments Information in case
CA-CD-PENDING-INFO	Pending Critical Deadlines Information in case
CA-CM-FIRM-ROLE	Case Manager Firm Role
CA-CM-TITLE	Case Manager Title
CA-COURT-INFO	Case Court information
CA-DEF-INFO	Case Defendant information
CA-DISBURSEMENT-INFO	Case Disbursement information
CA-INC-UDFS-ALL	Incident All UDF
CA-INC-UDFS-ANSWERED	Incident UDF Answered
CA-LAST-NOTES	Case Last five notes
CA-LIEN-INFO	Case Liens information
CA-LIEN-TABLE-BY-PL	Lien Table by Plaintiff
PL-LIEN-TABLE-EMAIL	Plaintiff Lien Table for settlement emails
CA-NEGOTIATION-INFO	Case Negotiations information
CA-ORG-DEFENDANT	Is Defendant an Organization or Municipality
CA-PARA-ADDR1	Case Paralegal Address1
CA-PARA-ADDR2	Case Paralegal Address2
CA-PARA-ADDR3	Case Paralegal Address3
CA-PARA-ADDRESS-BLOCK	Case Paralegal Address Block
CA-PARA-ADDR-HORIZ	Case Paralegal Address Horizontal
CA-PARA-CITY	Case Paralegal City
CA-PARA-CITY-STATE-ZIP	Case Paralegal City, State Zip
CA-PARA-CNTY	Case Paralegal County

CA-PARA-FIRM-ROLE	Case Paralegal Firm Role
CA-PARA-FIRST-NAME	Case Paralegal First Name
CA-PARA-LAST-NAME	Case Paralegal Last Name
CA-PARA-NAME	Case Paralegal Full Name
CA-PARA-OCCUP	Case Paralegal Occupation
CA-PARA-STATE	Case Paralegal State
CA-PARA-TITLE	Case Paralegal Title
CA-PARA-ZIP	Case Paralegal Zip
CA-PL-INFO	Case plaintiff's information
CA-PRIMARY-CONT-NAME	Case Primary Contact Name
CA-PRIMARY-PL-NAME	Primary plaintiff name
CA-REF-SOURCE	Case referral source
CA-REF-SOURCE-LIST	List of case referral sources
CA-SERIOUS-INJURY	Is injury serious
CA-SET-MIN-AMOUNT	Minimum Settlement Value
CA-STAFF-FIRM-ROLE	Case Staff Firm Role
CA-STAFF-INFO	Case Staff information
CA-STAFF-TITLE	Case Staff Title
CA-TYPE-FULL	Case type full name
CA-VALUE-HIST	Case Value History
CC-ADJ-ADDRESS-BLOCK-NO-NAME	Counter Claim Adjuster Address Block without name
CONT-ADDRESS-BLOCK-NO-NAME	Contact Address Block without name
CONT-EMPLOYER	Contact Employer
CONT-EMPLOYER-ADDRESS-BLOCK	Contact Employer Address Block
COURT-COMMENTS	Court Comments
COURT-JUDGE-FAX	Court Judge Fax
COURT-OTHER-NAME	Court Other Name
DEF-ADJ-ADDRESS-BLOCK-NO-NAME	Defendant Adjuster Address Block without name
DEF-INS-ADDRESS-BLOCK-HORIZ	Defendant Insurance Company Address Block Horizontal
DEF-MARITAL-STATUS	Defendant Marital Status
FIRM-ADDRESS-HORIZ	Firm Address Horizontal
FIRM-ATTORNEY-TITLE	Firm Attorney Title
FIRM-PARALEGAL-TITLE	Firm Paralegal Title
FIRM-STAFF-FIRM-ROLE	Firm Staff Firm Role
FIRM-STAFF-TITLE	Firm Staff Title
INC-POLICEATSCENE	Is police at scene
LIEN-ADDR-BLOCK	Lienor Address Block
LIEN-CNTY	Lienor County
LIEN-RECOVERY-AGENT-ADDR1	Lien Recovery Agent Address1
LIEN-RECOVERY-AGENT-ADDR2	Lien Recovery Agent Address1
LIEN-RECOVERY-AGENT-ADDR3	Lien Recovery Agent Address1



LIEN-RECOVERY-AGENT-ADDR-BLOCK	Lien Recovery Agent Address Block
LIEN-RECOVERY-AGENT-ADDR-HORIZ	Lien Recovery Agent Address Horizontal
LIEN-RECOVERY-AGENT-CITY	Lien Recovery Agent City
LIEN-RECOVERY-AGENT-CNTY	Lien Recovery Agent County
LIEN-RECOVERY-AGENT-PHONE#	Lien Recovery Agent Phone Number
LIEN-RECOVERY-AGENT-STATE	Lien Recovery Agent State
LIEN-RECOVERY-AGENT-ZIP	Lien Recovery Agent Zip
MED-REQUEST-FIRST-SENT-DATE	Medical Records Request First Request Date
MED-REQUEST-FIRST-SENT-DATE-EXP	Medical Records Request First Request Date Expanded
MED-REQUEST-LAST-SENT-DATE	Medical Records Request Last Request Date
MED-REQUEST-LAST-SENT-DATE-EXP	Medical Records Request Last Request Date Expanded
NEG-COMMENTS	Negotiation Comments
NEG-DATE	Negotiation Date
NEG-PL-NAME	Settlement Plaintiff Name
NEG-STAFF-NAME	Negotiation Staff Name
OFFICE-ADDR1	Office Address1
OFFICE-ADDR2	Office Address2
OFFICE-ADDR3	Office Address3
OFFICE-ADDRESS-BLOCK	Office Address Block
OFFICE-ADDRESS-BLOCK-NO-NAME	Office Fax Number
OFFICE-ADDRESS-HORIZ	Office Address Horizontal
OFFICE-ADDRESS-HORIZ	Office Address Horizontal
OFFICE-CITY	Office City
OFFICE-CITY-STATE-ZIP	Office City, State, Zip
OFFICE-CNTY	Office County
OFFICE-EMAIL	Office Email
OFFICE-FAX#	Office Fax Number
OFFICE-NAME	Office Name
OFFICE-PHONE#	Office Phone Number
OFFICE-STATE	Office State
OFFICE-STATE-FULL	Office State (Not Abbreviated)
OFFICE-ZIP	Office Zip
PL-ADDRESS-BLOCK-NO-NAME	Plaintiff Address Block without name
PL-ADJ-ADDRESS-BLOCK-NO-NAME	Plaintiff Insurance Adjuster Address Block without name
PL-DIVORCED-X	Merges as X if Plaintiff is Divorced, underscore otherwise
PL-FEMALE-X	Merges as X if Plaintiff is Female, underscore otherwise
PL-MALE-X	Merges as X if Plaintiff is Male, underscore otherwise
PL-MARITAL-STATUS	Plaintiff Marital Status
PL-MARRIED-X	Merges as X if Plaintiff is Married, underscore otherwise
PL-MED-PRVD-SPECIALITY	Medical Provider Specialty
PL-MED-PRVDS-TOT-BILL-AMNT	Plaintiff Medical Providers Total Bills Amount

PL-MED-PRVD-SUBSPECIALITY	Medical Provider Subspecialty
PL-NF-ADJ-ADDRESS-BLOCK-NO-NAME	No Fault Adjuster Address Block without name
PL-SEPARATED-X	Merges as X if Plaintiff is Separated, underscore otherwise
PL-SINGLE-X	Merges as X if Plaintiff is Single, underscore otherwise
PL-WIDOWED-X	Merges as X if Plaintiff is Widowed, underscore otherwise
REF-ATTY-ADDRESS-BLOCK	Referring Attorney Address Block
SET-COMMENTS	Settlement Comments
SET-COVERAGE	Settlement With
SET-NET-TO-CLIENT-AMT-EXP	Net Settlement Amount To Client (Numbers in Words)
SET-PL-NAME	Settlement Plaintiff Name
SOL-AFFDVT-DEADLINE	Affidavit Filing Deadline
SOL-AFFDVT-FILED	Affidavit Filed Date
SOL-AFFDVT-REQD	Is Filing Of Affidavit Required Regarding SOL
SOL-FIRST-RCVD-DATE	The first/earliest Statute of Limitations Answer Received Date
SOL-FIRST-RCVD-DATE	The first/earliest Statute of Limitations Answer Received Date
USER-FIRM-ROLE	Current User Firm Role
USER-TITLE	Current User Title

- A new type of the merge code has been added: “-X.” A merge code of this type returns either “X” or “\_”. The idea is that you can use this merge code in form templates that require using checkbox selections. For example, the following code text in the document:

```
[<! [PL-FEMALE-X] !>] Female
[<! [PL-MALE-X] !>] Male
```

will result in the following merged text if plaintiff is female:

```
[X] Female
[ ] Male
```

## New/Updated Reports

- Multiple reports have been modified to exclude headers in the Excel export to simplify sorting/searching in Excel.
- Adjourned/Canceled Appointments Report – Requesting Party has been added to the report.
- Case Time Tracking – This new report that shows time tracking records has been added.

**Time Tracking Report** From: 1/1/2016 To: 7/30/2016 Date: 7/29/2016

Time Stamp	Case #	Staff	Activity	Duration	Billable Amount	Comments
07/25/2016	<a href="#">1017260</a>	Selizhuk, Igor V., Esq.	Court Appearance	0:00		
06/10/2016	<a href="#">1017260</a>	Selizhuk, Igor V., Esq.	Court Appearance	03:00		
02/29/2016	<a href="#">1017260</a>	Selizhuk, Igor V., Esq.	Court Appearance	03:00	450.00	
01/29/2016	<a href="#">1017260</a>	Selizhuk, Igor V., Esq.	Deposition: Prep/Take/Defend	10:00		

- Lien Report – Date filters have been added
- New Case Report – More columns have been added to the report. The ability to select columns has also been added.

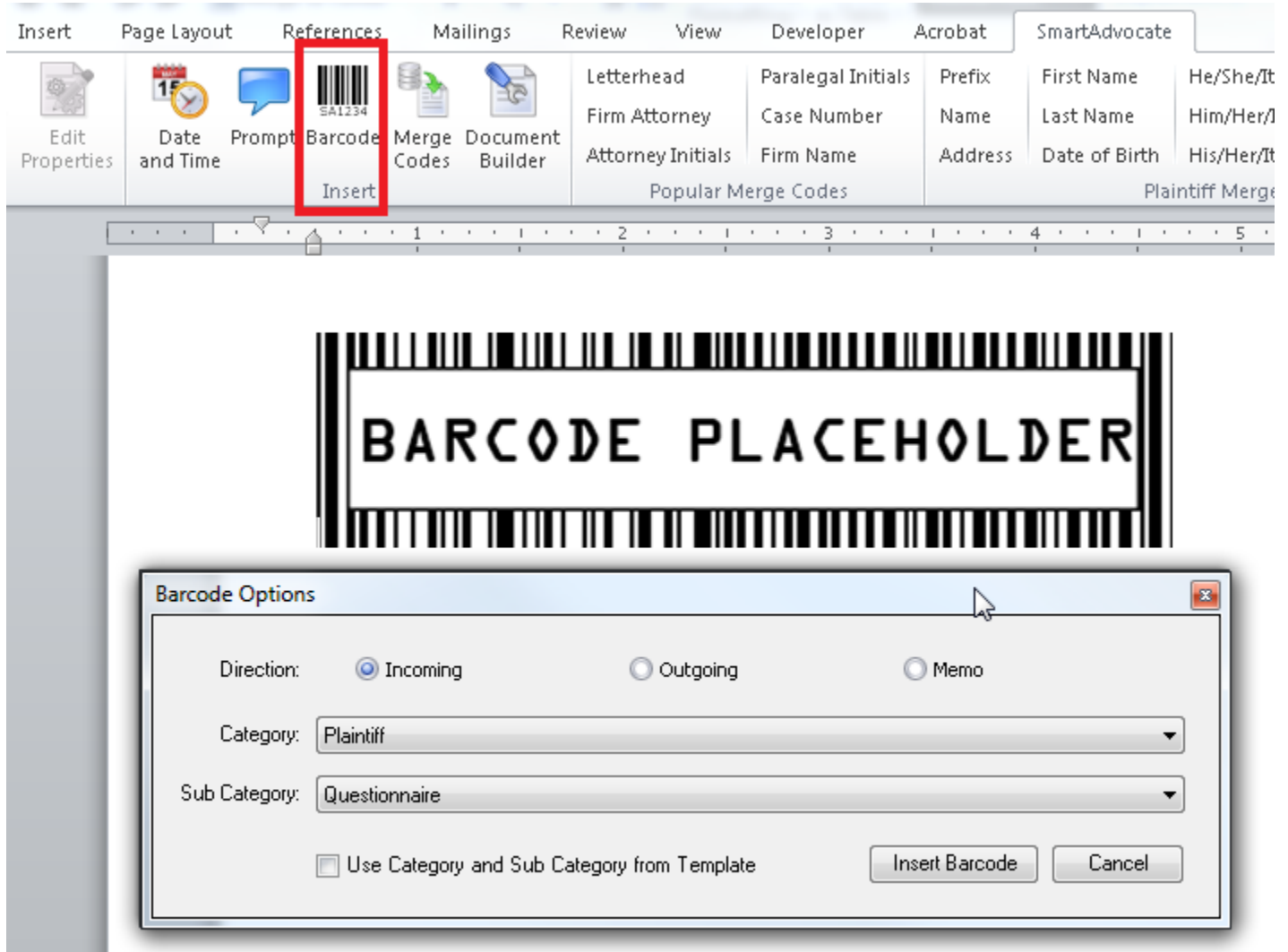
- Case Statistics – This new report that shows new case (inquiry) statistics has been added.

**Case Statistics** From: 7/29/2016 To: 8/4/2016 Date: 8/4/2016

# of Inquiries	367
.. # of Paid Advertisement Cases	341
.... # of [blurred]	17
.... # of [blurred]	115
.... # of [blurred]	219
.. # of Referred by Attorney	14
.. # of Referred by Non-Attorney	14
# of Sign Ups	65
.. # of Email Sign Up	8
.. # of Presign - Sign Up Scheduled - In House	3
.. # of Presign - Sign Up Scheduled - Investigator	14
.. # of Sign Up By Mail	40
# of Inquiries not scheduled for Sign Up	327
# of Cases Closed	438
# of Cases Received and Closed	241
# of Cases Referred Out	33
# of Retainers Received	48
# of Cases with new Offer	1(\$114,000.00)

## Other Changes

- Support for barcodes in the document templates has been introduced. Now you can generate a barcode along with the document, so when the document comes back you can scan it immediately.



- Windows authentication can now be used to log users in.
  - This option has to be enabled in Admin -> System Parameters (Internal)
  - User login names defined in SmartAdvocate need to match user domain login names
  - The SA virtual directory on IIS needs to be configured to enable Windows integrated security and disable anonymous access
  - There is an option in Admin -> System Parameters (Internal) that disables regular login and only allows users to use Windows authentication

- Files can now be renamed using case/document information when downloaded or emailed.

<input checked="" type="checkbox"/>	This is for training - description	Expenses	Client Advances	
<input checked="" type="checkbox"/>	Letter from treating dr re prognosis	Medical	Letter	
<input checked="" type="checkbox"/>	Letter from Doctor re prognosis			
<input type="checkbox"/>	Instructions on how to attach documents		To Client	
<input type="checkbox"/>	Auto-generated letter medical request.Medic Records Request - Ho			
<input type="checkbox"/>	Authorization - Hipaa - SA		zation	
<input type="checkbox"/>	CLIENT - Sign & Return			

Open

Copy

Edit Properties

Email

Download (rename)

Download

Upload

Delete

The format of the file name is completely customizable by you and you can save your favorite default.

**Rename File(s)**

**Rename options:**

[Case Number]

[Category]

[Sub-Category]

[From]

[To]

[Document Date]

[Description]

[Counter]

Save as Default

**Resulting filename(s):**

5015345 Pleadings\_Legal Summons\_Complaint SmartAdvocate, LLC 07-25-2016 COMPLAINT - AUTO - Bike v. owner & operator 1.  
Seth\_COMPLAINT\_AUTO\_Bike\_v.\_owner\_\_operator\_7\_25\_2016\_4\_24\_10\_PM.docx  
5015345 Discovery Bill of Particulars SmartAdvocate, LLC SmartAdvocate, LLC 07-15-2016 Discussed with Expert - McGregor 2.pdf  
5015345 Expenses Client Advances SmartAdvocate, LLC SmartAdvocate, LLC 07-06-2016 This is for training - description 3.pdf  
5015345 Medical Letter Stong Memorial Hospital SmartAdvocate, LLC 07-06-2016 Letter from treating dr re prognosis 4.docx  
5015345 Medical Letter Stong Memorial Hospital SmartAdvocate, LLC 07-06-2016 Letter from Doctor re prognosis 5.docx

Confirm Cancel

- Contact cards can now have an avatar/picture associated with them (limited to 200x300 pixels or 200KB).
- A feedback menu to send your comments to SmartAdvocate has been added.

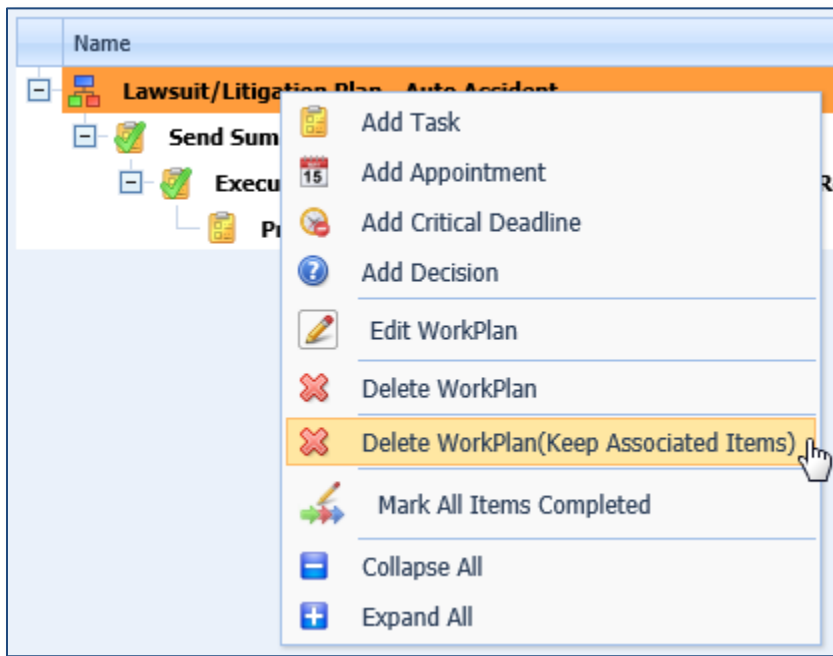
Contacts:

Welcome Administrator ▾

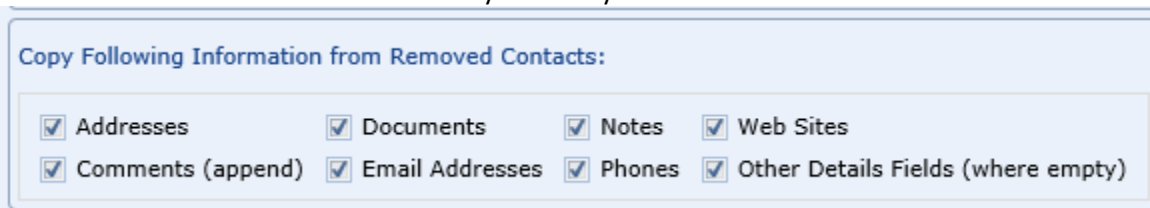
Tell Us What You Like

Tell Us What Can Be Better

- Workplans in a case can now be deleted while keeping the work items that were generated by the plans.



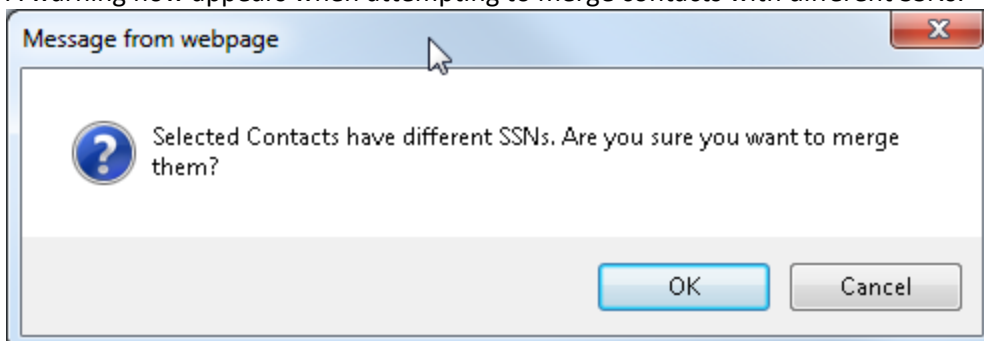
- When merging contacts, SmartAdvocate now offers you the option to copy desired information from the removed contacts to the contact that stays in the system.



- A new column has been added to the Merge Contacts dialog: Phone No. Contact names are now clickable, so you can double-check which contact you need to keep.



- A warning now appears when attempting to merge contacts with different SSNs.



- A new column has been added to all search tabs in the Outlook Plugin: Incident Date.

Last Accessed Cases			My Cases	All Cases
Case Number	Case Name	Incident Date		
5015352	Casanova v. Doe	9/2/2014		
6000001	Smith v. Hospital For Joint Diseases Orthopaedic	2/1/2015		

- SMS Template functionality has been added. You can configure templates in Admin -> Text Message Templates and use them when sending text messages.

Edit Record
✖

Name:

Text: 

Dear <! [CONT-FIRST-NAME] !>, please call me back.  
 <! [USER-NAME] !> my phone is <! [USER-PHONE] !>

- SmartAdvocate plugins for Outlook and Word can now use Web Services instead of direct SQL connection.
- The ability to manage cached email addresses has been added to the Case Email page.
- The ability to specify different phone numbers for outgoing text messages per office has been added. The numbers can be configured using Admin->Picklist Maintenance page (Offices).
- The option to save a copy of the sent email in the note section has been added to the Case Email page.
- Delivery Receipt and Read Receipt options have been added to the Case Email page.

<input type="button" value="To..."/>	<input type="text" value="x fakeemail@fakeserver.com"/>	<input type="checkbox"/> Save a copy in Notes
<input type="button" value="Cc..."/>	<input type="text"/>	<input type="checkbox"/> Send a copy to me
<input type="button" value="Bcc..."/>	<input type="text"/>	<input type="checkbox"/> Send a blind copy to me
Subject:	<input type="text" value="Hello"/>	<input type="checkbox"/> Delivery Receipt
Importance:	<input type="radio"/> High <input checked="" type="radio"/> Normal <input type="radio"/> Low	<input type="checkbox"/> Read Receipt

Note that those options will only work if the recipient's email client supports them and the recipient allows such notifications to be sent.

- The option to warn the user when an appointment is scheduled in the past has been added. This option needs to be enabled in the System Parameters.

Calendar	Warn when appointments are scheduled in the past	True	<input type="button" value="⏏"/> <input type="button" value="✎"/>
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- The allowable length for document template names has been increased to 256 characters.
- A warning now appears when a user is trying to close the browser window without saving a modified contact card.
- Support for pdf forms has been improved. SmartAdvocate can now work with more complex forms.

- A new system parameter that specifies the maximum number of contacts that can be merged at the same time has been added.

Contact	Maximum number of contacts that can be merged.	11	
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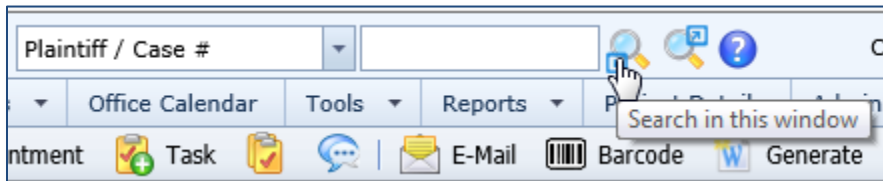
- When selecting an insurance company or adjuster for document generation, the insurance type is now displayed.

**Select Defendant Insurance Company:**

Allstate Insurance Company (Christie Palladino) - Liability Primary

GEICO (Adrian Bullaro) - Liability Excess Primary

- Top Search can now be performed either in the same window or in a new tab. Two buttons have been added next to the search bar, one for each option.



You can also set the default behavior for when you press the Enter button on the Top Search in the User Preferences.

**Top Search**

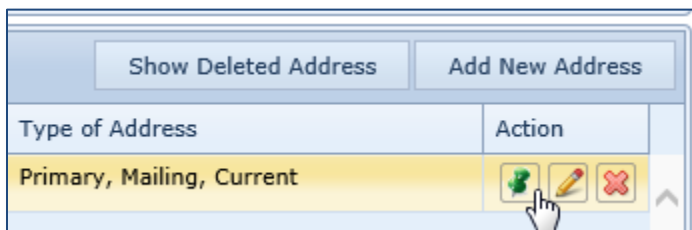
Open  Closed  All

Open new tab for search result

Default Top Search List:

Plaintiff / Case #

- The Map Dashboard will now show the number of records returned by a search.
- Multiple new items have been added to the Admin -> Picklist Maintenance page.
- Multiple new items have been added to the Admin -> System Parameters page.
- A Map button has been added to the Address table on the contact card screen.



- Gender information is now displayed on the brief contact info panel (right-click on a contact name to bring up the panel).

Mother, jane (P)-Victim

**Contact Info** (P)-Victim

**Address:** 1 Main St ,  
Townville, NY 11050

**Phone #:** (125) 489-6254 - Originating Phone #  
(P)

**Email:**

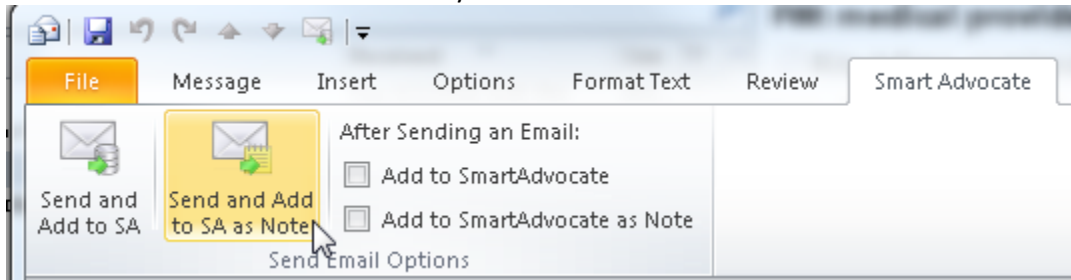
**SSN:** 555-89-6658 **Gender:** Female

**Date of Birth:** 06/04/1991

**Age:** 25 year(s), 1 month, 28 day(s)



- The Outlook add-in now has the ability to send and attach email as a note.



- The Outlook add-in can now be configured to have a default note type and document category/sub-category. This is a system-wide setting.

Administrator Parameters Setup	
Drag a column header here to group by that column	
Group Description	Parameter Description
out	
Outlook add-in	Default Attachment Category/Sub-Category for Outlook add-in
Outlook add-in	Default Note Type for Outlook add-in

- The Template Editor now allows you to edit letterheads.

Open Template				
<input type="radio"/> Open <input type="radio"/> Template <input checked="" type="radio"/> Letterhead <input type="radio"/> Custom Merge Code				
Office Name	Letterhead File Name	Created On	Modified On	
New York	LetterheadSA.docx	3/2/2011	3/29/2016	
Florida	LetterheadSA.docx	3/2/2011	3/29/2016	
Rochester	LetterheadSA1.docx	3/8/2016	7/17/2016	